United States Department of Agriculture
Grain Inspection, Stockyards and Packers Administration

Customer Information Management (CIM)

User's Manual

Version 1.0

October 30, 2006

Revision History

Previous Change History

Table A – Previous Change History

VERSION	DATE	AUTHOR	COMMENT
1.0	10/20/06	Ann Lang	First draft. No TOC, TOF.
1.1	10/23/06	Ann Lang	Final draft, TOC, TOF.
1.2	10/27/06	Jim Vanderweilen	
1.3	10/30/06	Ann Lang	Incorporate changes from JV.

Document Sign-off

Table B – Document Sign-off

DATE	NAME	TITLE

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I. Introduction

The Customer Information Management (CIM) application was developed as part of the USDA's Grain Inspection, Packers and Stockyards Administration (GIPSA) Application Modernization (GAM) initiative. CIM creates a central clearinghouse for customer data that was previously managed by CRT and IDW, and takes over customer data management tasks from the National Quality Database (NQDB).

CIM captures and maintains all information pertaining to customers for whom FGIS and Official Agencies provide business services, such as weighing, export, and grading. Through a web interface, CIM is used internally by GIPSA employees and externally by public users with Level 1 USDA accounts or above. Access to customer data is restricted through GAS (GAM's eAuthorization application), and authenticated through the USDA's eAuthentication application.

With the CIM web interface, public users can request a customer number assignment and create new customer records to hold names, addresses, and points of contact. Once assigned, customers can manage their data and individually grant or deny access to their data on an individual user basis. A CIM number also allows the user to access customer records through other applications, such as certificate records in CRT and service results in IDW.

GIPSA employees, Official Agency (OA) employees, and service requesters are able to use CIM to search for customers, view customer information, and complete such business processes as requesting official services and issuing certificate data. Future expansions of CIM will include integration with Financial Claims Management (FCM) and other Packers & Stockyards Program functions.

USDA GIPSA Menu Page

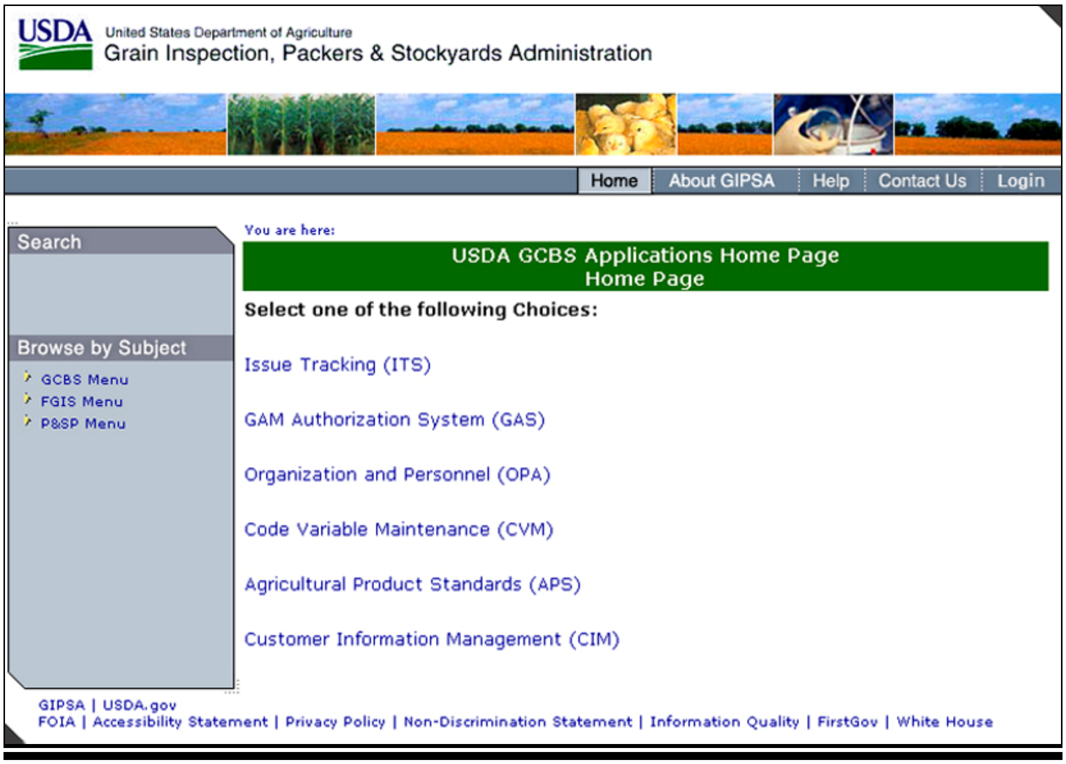


Figure 1 – the USDA's GIPSA Common Business Systems Menu Page

This is the primary menu page for the GIPSA Common Business Systems (GCBS) suite of programs, Fig. 1 above. The Customer Information Management (CIM) system is accessed from this screen by customers, users wishing to become customers, and GIPSA employees and affiliates.

Every page within the GAM suite has three navigation areas: a menu of internal links, a menu of external links, and general navigation buttons. The rest of the screen will change according to the active application.

General Navigation

The buttons in the grey bar at the top of the screen direct you to system resources.

LINK	REDIRECTS USER TO
Home	USDA GIPSA Intranet or Internet home page, depending on network
About GIPSA	GIPSA public information page
Help	GAM-wide help system
Contact Us	GIPSA public contact information page
Login	GIPSA user login interface

Internal Navigation

The internal links are located in the grey Search **/** Browse by Subject navigation panel on the left. At the GCBS menu page level, it links to other GAM applications. Once you enter an application (such as CIM or eAuthorization), the Search / Browse panel will change to reflect that application's menu options.

LINK	**REDIRECTS USER TO**
GCBS Menu	the menu page for the common business system applications for all of GIPSA
FGIS Menu	the menu page for the Federal Grain Inspection Service suite of applications
P&SP Menu	the menu page for the Packers & Stockyards Program suite of applications

External Navigation

The external links are accessed from the menu bar at the bottom of each page in the OPA application.

LINK	**REDIRECTS USER TO**
GIPSA	the Grain Inspection, Packers & Stockyards Administration organizational home page
USDA.gov	the United States Department of Agriculture home page
FOIA	the USDA Freedom of Information Act page
Accessibility Statement	the USDA Accessibility Statement page
Privacy Policy	the USDA Privacy Policy page
Non-Discrimination Statement	the USDA Non-Discrimination Statement page
Information Quality	the USDA Quality of Information Guidelines page
FirstGov	the U.S. Government's Web Portal home page
White House	the White House home page

A. Customer Information Management (CIM) Process Flow

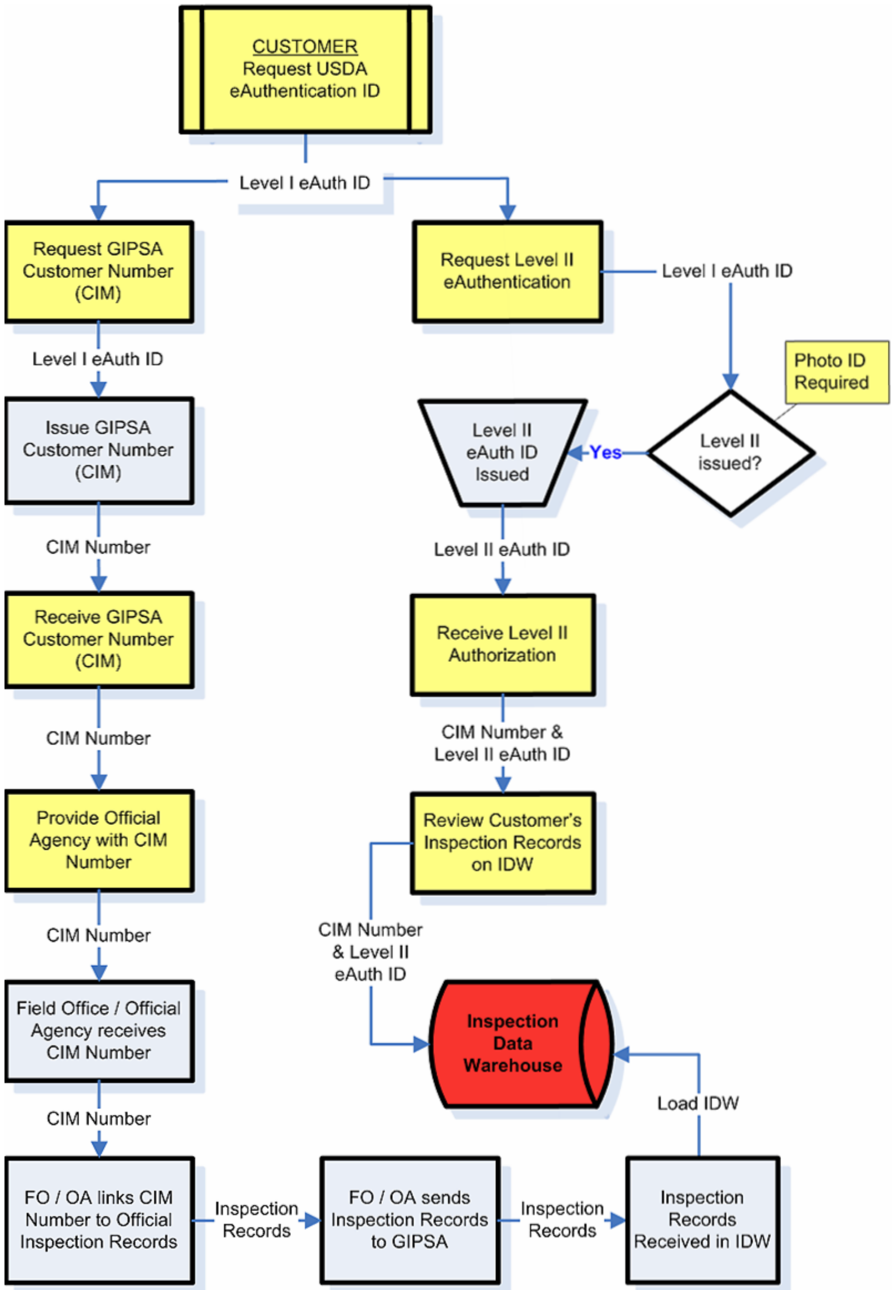


Figure 2 – Process of Authenticating A User For CIM

B. CIM Application Navigation

Navigating Within the Application

The text that starts with **You are here:** immediately above the green title bar on the page is referred to as the breadcrumbs area. As you navigate through CIM, this area will change to reflect your chain of commands. For example, if you start at the CIM Menu Page, select **My Customer List**, and open the **Authorized User List** for a customer record, the breadcrumbs area will read:

You are here: CIM Menu / Customer List / Authorized User List

The breadcrumbs area provides active navigation links. In the example above, you can click CIM Menu in the breadcrumbs area to return directly to the Menu Page, or Customer List to return to the previous page.

Important Note: Do not use your browser's "Back" button to navigate through CIM, as this can generate page errors. Use the breadcrumbs, the navigation buttons provided at the bottom of the screen (such as **Return** or **Cancel**), or the menu links in the grey Search **/** Browse by Subject navigation panel to the left of the screen.

Navigating List Pages

Almost all of the list pages in CIM display data in the form of tables. These list pages might be one of the main pages, such as the **Customer List**, or a table displaying the results of a search. Each table has the same navigation controls. Each table also displays the total number of records at the bottom of the page, next to the row and page navigation tools.

To *change the number of rows displayed on the page,* type the desired value (from 1 to all records) in the field next to "**Rows:**" and press enter. Tables will display up to 25 rows per page unless otherwise specified.

To *view the next page or previous page of records*, click the forward ▶ or backward ◀ arrows.

To *jump to a different page of records*, type the desired page number in the field next to "**Page:**" and click "**Go**."

To *sort records*, click a column header (such as Last Name) to sort by that field. Sort order can be changed (from ascending to descending or vice versa) by clicking the header again.

To *locate a specific record*, choose **Search Customers** from the application Menu Page or from the grey Search panel to the left.

Internal Menu Navigation

The internal menu links are located on the CIM main (menu) page and in the grey Search **/** Browse by Subject navigation area on the left side of the page. All of the CIM commands available to you will be visible in the Search **/** Browse navigation panel, no matter where you are in the application.

Session Timeout

As a security precaution, all GAM applications will time out when they are left idle for an extended period of time. All timeouts will default to the GAM Session Timeout page (Fig. X). Click the blue hyperlink **here** to be redirected to the login page.

Once you log back in, you will return to the main menu page of the application which timed out.

Figure 3 – Session Timeout Page

II. CIM Functions

Overview of User Types

CIM is used both internally by GIPSA employees and externally by the general public to complete business processes with the USDA. Broadly speaking, there are three classes of user: public users, or *customer users*; users employed by or affiliated with GIPSA agencies, or *GIPSA users*; and GIPSA administrators.

Within each of those classes, users have access to some or all customer records in the CIM database, depending on their individual permissions and business requirements. Except for administrators, there can be both read-only and full-edit users in each class.

GIPSA administrators have full CIM access. These users can search for any customer record in the CIM database, view all customer records, and edit any record. In addition, they can maintain the table of available preferences and preference values.

GIPSA users can be read-only users or have edit permissions. They have varied levels of access to customer records; for example, a GIPSA agency employee may view all customers who receive services from that agency.

Customer users have access to their own records, and may have read-only access to other customers where specific access has been granted. These users can search for and view only the customer numbers to which they have access.

CIM Application Security

Because CIM is a secure application, customer data is not publicly available. The USDA's eAuthentication program controls each user's access to customer records.

The only requirement for creating a customer record is a Level 1 USDA eAuthentication account. However, only users with a Level 2 account (or above) can edit a customer record after it is created.

If you have a Level 1 account, you can create a customer record, but you will only have **read-only access** to your record. Level 1 customers must manually apply for a Level 2 eAuthentication account before they can edit their customer data or authorize other users to access their records.

> A Level 2 account can be issued by your local USDA Service Center. For more information on Level 2 accounts and Service Center locations, refer to these resources:
>
> **eAuthorization Help**
> **www.eauth.egov.usda.gov/eauthWhatIsAccount.html**
>
> **Local USDA Service Center Locator**
> **http://offices.sc.egov.usda.gov/locator/app**

A. Using the CIM Menu Page

A. 1 — CIM for Customers

Customers are public users who receive or provide services for USDA Grain Inspection, Packers and Stockyards Administration. Customers enter CIM through the Customer Menu Page (Fig. 4).

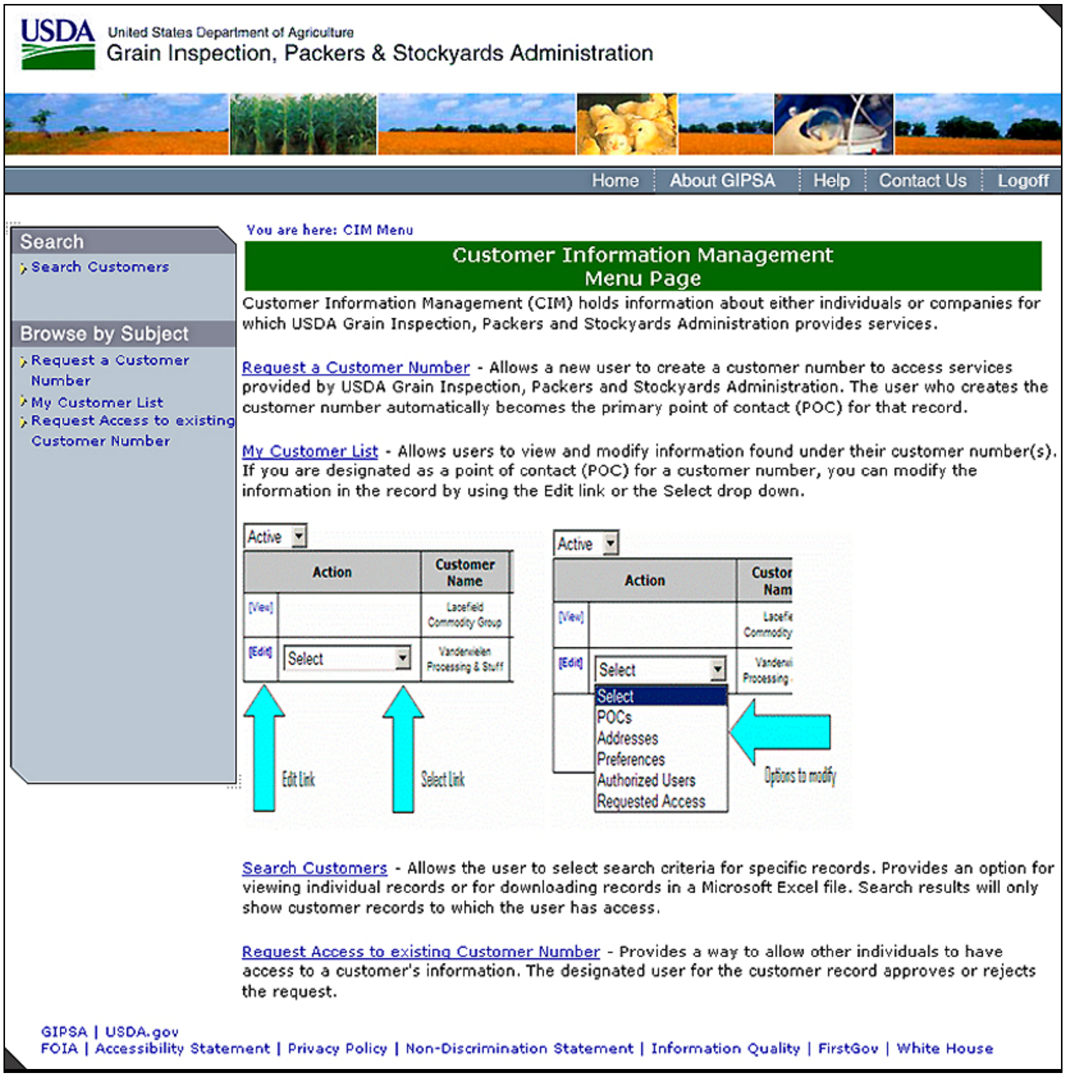


Figure 4 – CIM Customer Menu Page: Public Interface and Customers

To navigate the application, use the blue hyperlinks in the middle of the page or the menu commands in the left-hand Browse column. The Customer Menu Page has four menu options:

Request a Customer Number. See section B.

My Customer List. See section D.

Search Customers. See section E.

Request Access to an Existing Customer. See section C.

A. 2 — CIM for GIPSA and Official Agency Users

GIPSA employees, official agency (OA) users, and GIPSA administrators, referred to in this manual as "GIPSA users," enter CIM through the GIPSA User Menu Page (Fig. 5).

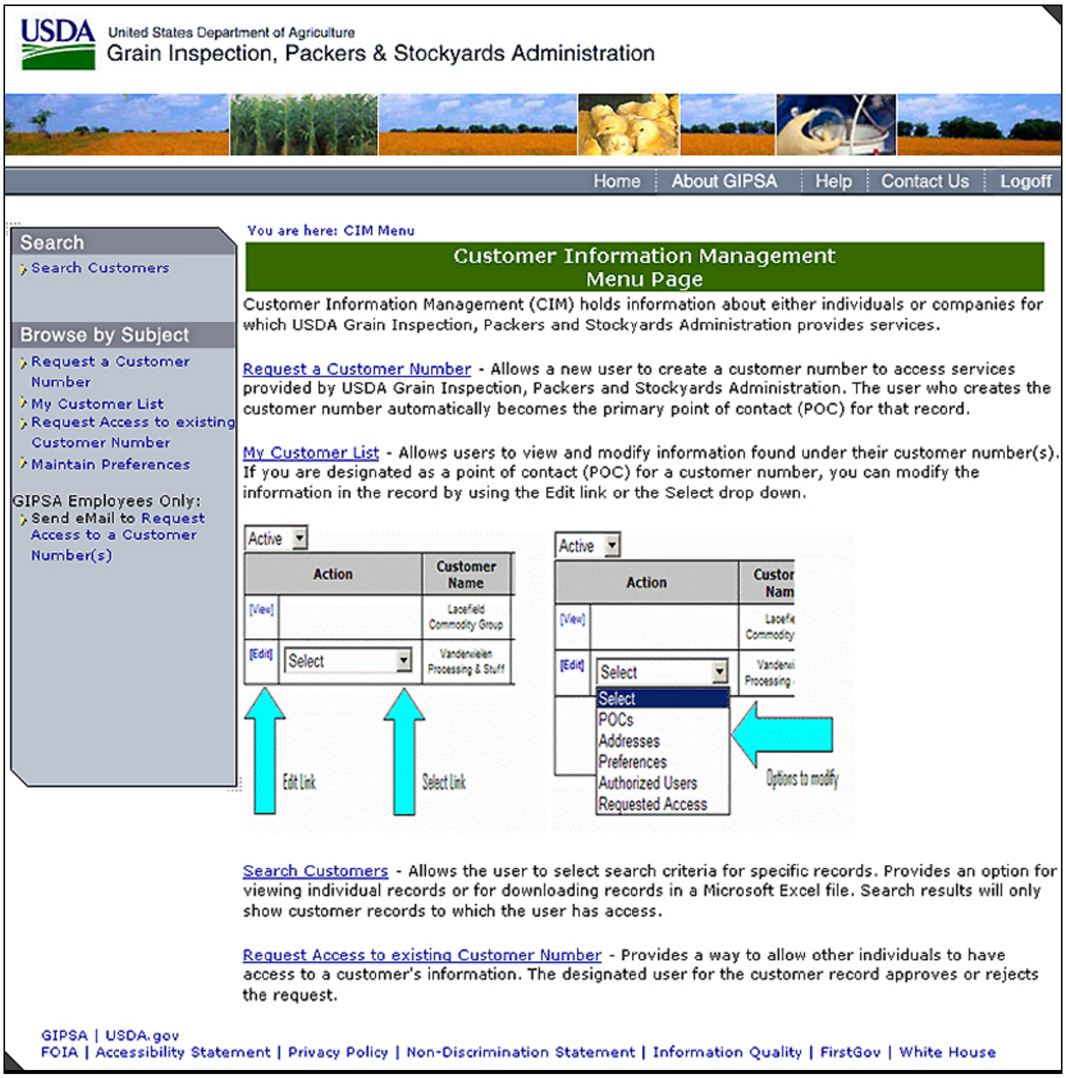


Figure 5 – CIM GIPSA User Menu Page: GIPSA Users

To navigate the application, use the blue hyperlinks in the middle of the page or the menu commands in the left-hand Browse column. The GIPSA User Menu Page has five menu options:

Request a Customer Number. See section B.

My Customer List. See section D.

Search Customers. See section E.

Request Access to an Existing Customer (GIPSA Employees). See section C.

Maintain Preferences. See section F.

B. Create a Customer Record

B. 1 — New Customers: Overview

In this manual, the phrases *create a customer record, add a new customer,* and *request a customer number* are all used to describe the same action: establishing a new customer account within CIM and gaining a unique identifier, the CIM customer number. A customer number is required for a number of business processes and services provided by the USDA.

The *customer* can be the user who establishes the account (an individual), or that user's employing organization (a business, cooperative, or other entity). Once a customer record is created, anyone may request access to that customer's records, but only a Point of Contact (POC) for that customer number or the user who created the record can authorize or deny the request.

There are three tiers of users for a customer record:

Primary POC. The user who creates a customer record becomes the primary POC, or point of contact. After a record is created, only the primary and secondary POCs can view or edit customer data. The primary POC must authorize all other users to grant access the customer record.

Secondary POC. The primary POC can make any authorized user a secondary POC. Secondary and primary POC roles function in the same way with two exceptions: there are an unlimited number of secondary POCs, and they can be deleted from the customer account by the primary POC.

Authorized users. Any POC (primary or secondary) can approve or deny a request for access to the customer's record. Once approved, the user who requested access becomes an authorized user. Authorized users can view, but not edit, customer data.

For more information about points of contact, see section D. 4.

For more information about authorized users, see section D. 8.

B. 2 — Request A Customer Number

From the CIM Menu Page (Figs. 4 & 5) or the left-hand Browse panel, select **Request A Customer Number** to open the **Add New Customer** form. On this form you will provide the data that will go into the permanent record associated with that customer number, whether as an organization (Fig. 6) or an individual (Fig. 7). Fields underlined in red are mandatory.

Note: the user who creates a customer record automatically becomes the customer's primary POC. For more information on POCs, see section D. 4.

Customer Number. The customer number is automatically assigned after the required data is submitted.

Customer Name. Enter the name of the business or of the individual customer: for example *JPG Shipping, Alice Brown*, or *ABC Co-Op, Inc.*

Customer Type. Select *Organization* or *Individual* from the droplist. Examples of *organizations* include corporations, cooperatives, and LLCs. Examples of *individuals* include sole proprietors, contractors, partners, and private operators.

FFIS Number. Enter the customer's 9-digit Foundation Financial Information System (FFIS) number, if known.

Point of Contact Type. When you create a new customer record, the point of contact is set to *Primary*.

Salutation. Select the correct title from the droplist, or leave this field blank.

First Name, Middle Initial, and *Last Name.* When you create a new customer record, the name fields will be pre-filled with information from your personal USDA eAuthentication user account. These fields cannot be edited.

Email address. Enter the customer's email address. This can be any address, not just the one connected to your personal USDA user account. For example, when John Smith creates a customer record for ABC Company, he could enter *jsmith@abccompany.com*, his personal email address, or *info@abccompany.com*, the general email address.

Contact Phone Number. Enter the customer's contact phone number, including the area code.

Address Type. The address type will default to *Mailing* for all new customer records.

Address 1 and *Address 2*. Enter the customer's primary mailing address. For information on editing the mailing address, and adding additional addresses (such as billing addresses and operating locations), see section D. 5.

City, State, and *Zip/Postal Code.* For mailing addresses in the U.S., enter the city, state and zip.

Zip/Postal Code and *Country.* For mailing addresses not in the U.S., enter the city and then select your country from the *Country* droplist. After your country is selected, enter the postal code.

Click **Submit** to save your data and create a new customer record. CIM will display a read-only confirmation page.

To exit the page without saving your data, click **Return.**

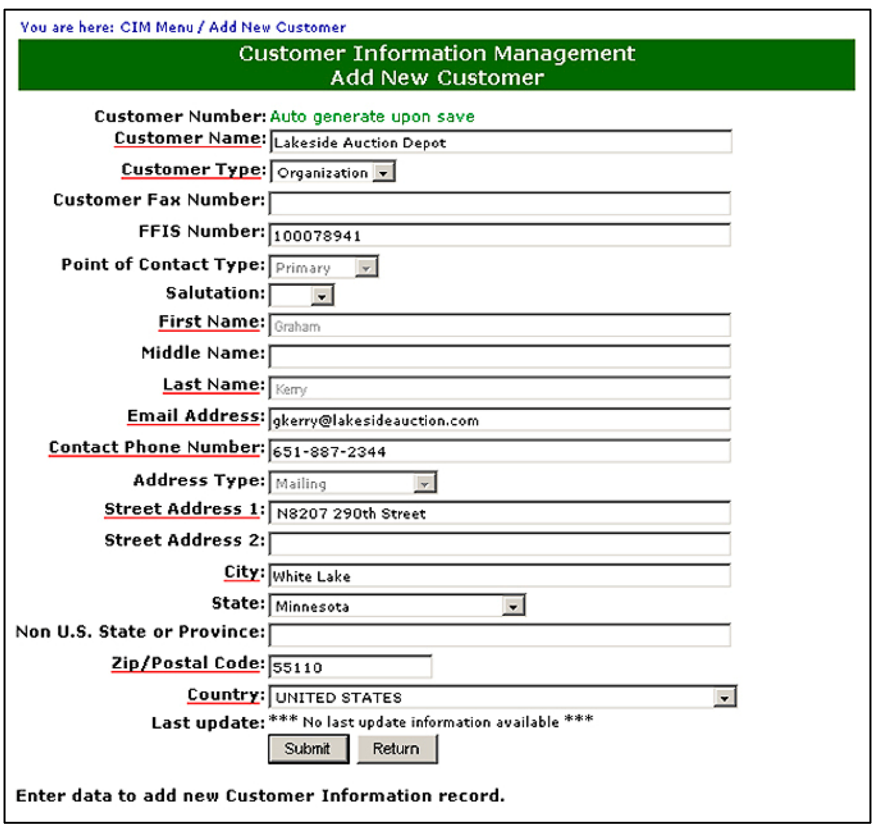
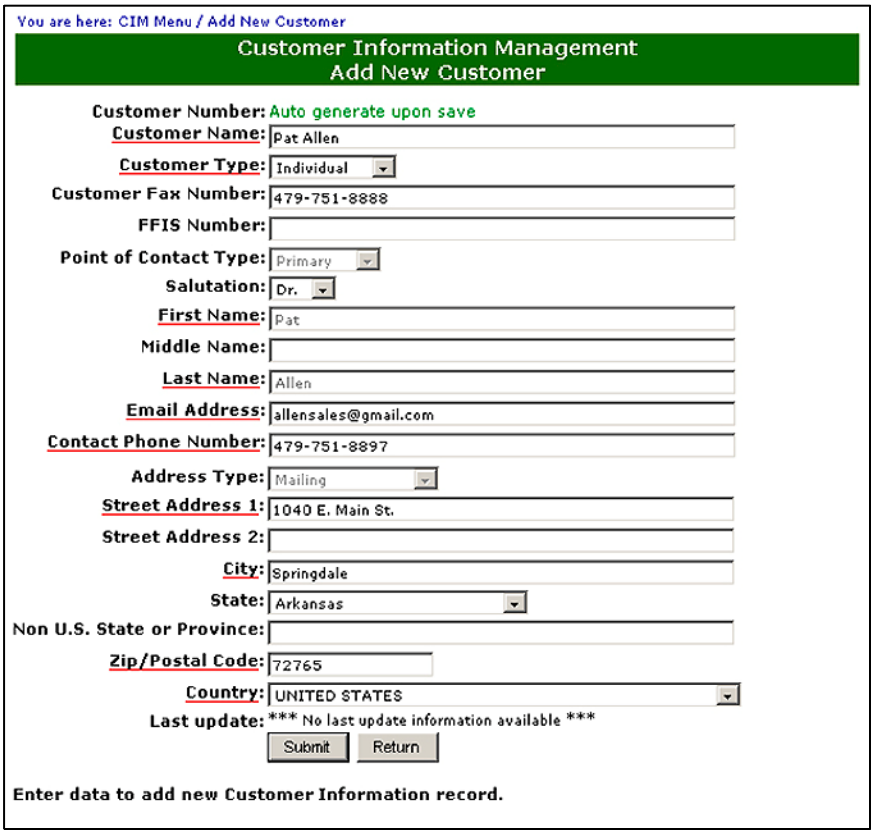


Figure 6 – Add New Customer (Organization)


You are here: CIM Menu / Add New Customer

Customer Information Management
Add New Customer

Customer Number: Auto generate upon save
Customer Name: Pat Allen
Customer Type: Individual
Customer Fax Number: 479-751-8888
FFIS Number:
Point of Contact Type: Primary
Salutation: Dr.
First Name: Pat
Middle Name:
Last Name: Allen
Email Address: allensales@gmail.com
Contact Phone Number: 479-751-8897
Address Type: Mailing
Street Address 1: 1040 E. Main St.
Street Address 2:
City: Springdale
State: Arkansas
Non U.S. State or Province:
Zip/Postal Code: 72765
Country: UNITED STATES
Last update: *** No last update information available ***
Submit Return

Enter data to add new Customer Information record.

Figure 7 – Add New Customer (Individual)

C. Request Access to Customer Number

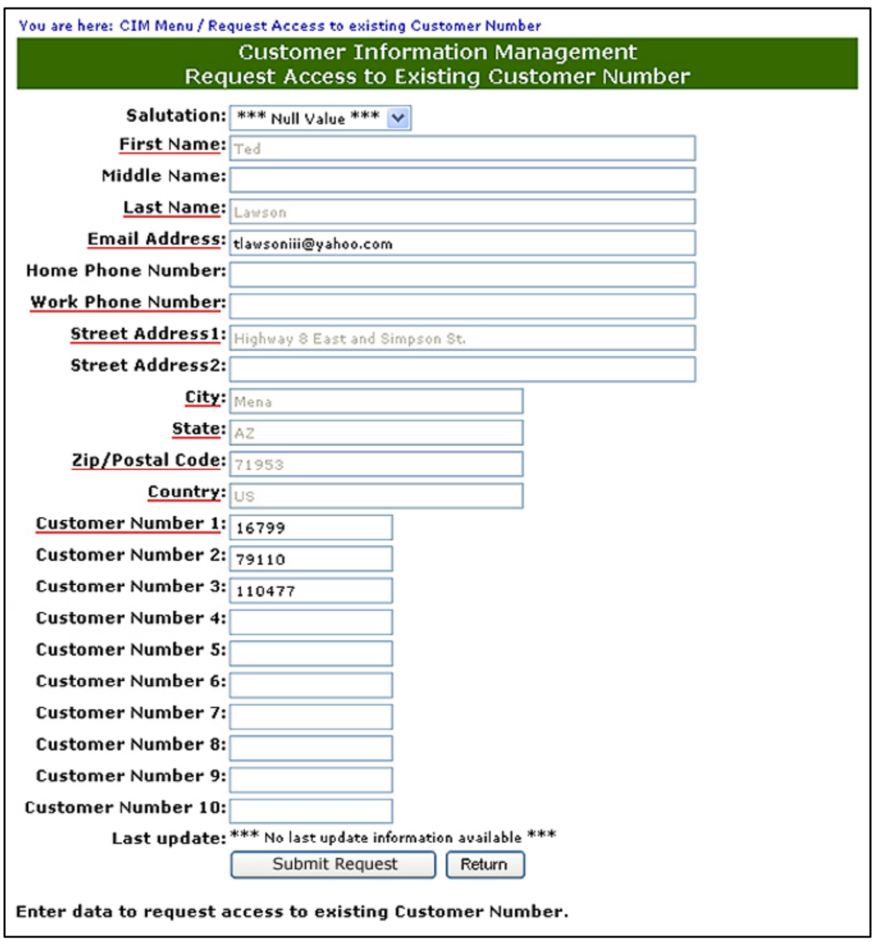
C. 1 — Request Access to Customer Number(s): Public Users

From the CIM Menu Page or the left-hand Browse panel, select **Request Access to Existing Customer** to open the **Request Access to Existing Customer Number** page (Fig. 8).

When you open the form, CIM will automatically fill in your name and address from the information on your USDA eAuthentication user account. Fill in your work phone number, at least one existing customer number (required), and any additional information. You can request up to fifteen customers at one time.

After you click **Submit Request**, your request will be emailed to the customer's point of contact. You will be notified by email once your request is approved or denied. If approved as an authorized user, you will have read-only access to the customer data with **View** and **Search**. If you are approved as a secondary point of contact (POC), you will have full access to the customer data with the **Edit** and **Search** commands.

Both authorized users and POCs can access the customer's records in associated applications, such as CRT (Certificate System).


You are here: CIM Menu / Request Access to existing Customer Number

Customer Information Management
Request Access to Existing Customer Number

Salutation: *** Null Value ***
First Name: Ted
Middle Name:
Last Name: Lawson
Email Address: tlawsoniii@yahoo.com
Home Phone Number:
Work Phone Number:
Street Address1: Highway 8 East and Simpson St.
Street Address2:
City: Mena
State: AZ
Zip/Postal Code: 71953
Country: US
Customer Number 1: 16799
Customer Number 2: 79110
Customer Number 3: 110477
Customer Number 4:
Customer Number 5:
Customer Number 6:
Customer Number 7:
Customer Number 8:
Customer Number 9:
Customer Number 10:
Last update: *** No last update information available ***
Submit Request | Return

Enter data to request access to existing Customer Number.

Figure 8 – Request Access to Existing Customer Number

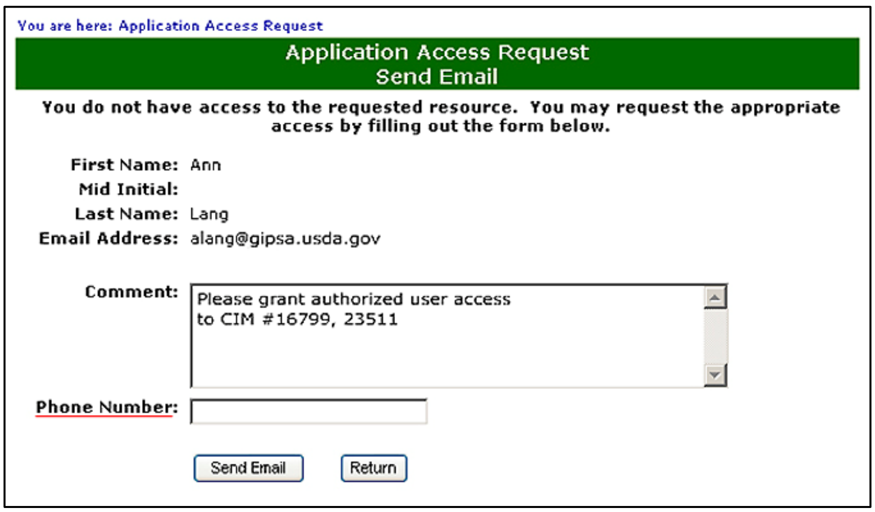
C. 2 — Request Access to Customer Number(s): GIPSA Users

From the GIPSA user version of the CIM Menu Page (Fig. 5) or the left-hand Browse panel, select **GIPSA Employees Only: Email to Request Access to Customer(s)**.

CIM uses the GAM **Application Access Request** form to log employee requests for access to customer numbers (Fig. 9). The name and email fields will be pre-filled with information from your eAuthentication account.

In the **Comments** field, list the customer number(s) to which you need access. If necessary, include an explanation for your request. Enter your business phone number and click **Send Email**. CIM application administrators will review your request, deny or approve it, and notify you of the decision via email or phone.

After you are granted access to a customer number, you can view the customer's data within CIM and any of the customer's records in associated applications, such as CRT (Certificate System).


You are here: Application Access Request

Application Access Request
Send Email

You do not have access to the requested resource. You may request the appropriate access by filling out the form below.

First Name: Ann
Mid Initial:
Last Name: Lang
Email Address: alang@gipsa.usda.gov

Comment: Please grant authorized user access to CIM #16799, 23511

Phone Number:

Send Email | Return

Figure 9 – GIPSA Employees Only: Email To Request Access to Customer Number(s)

D. Manage Your Customer Information

D. 1 — My Customer List: Overview

From the CIM Menu Page (Figs. 4 & 5) or the left-hand Browse panel, select **My Customer List** to open the **My Customer List** page (Fig. 10). This table provides the main functionality for managing customer records. From this screen, POCs and other authorized users can:

View all customer records to which they have access, including active and inactive records.

View the data for each customer record.

Both primary and secondary POCs have the following additional menu options:

View and edit customer data.

View, maintain, and delete authorized users.

Add, edit, or delete secondary and primary POCs.

Add, maintain, and delete additional customer addresses.

Set customer preferences for data file format, certificate reporting, and other business matters.

View users who have requested access to the customer record, and approve or deny the requests.

Note: Since it's possible to be a POC for one or more customer records, and an authorized user for one or more customer records, you may see a mix of commands in the table.

All records for which you are an authorized user will display **View** in the Action column.

All records for which you are a POC (either primary or secondary) will display **Edit** and the **Select** command droplist in the Action column.

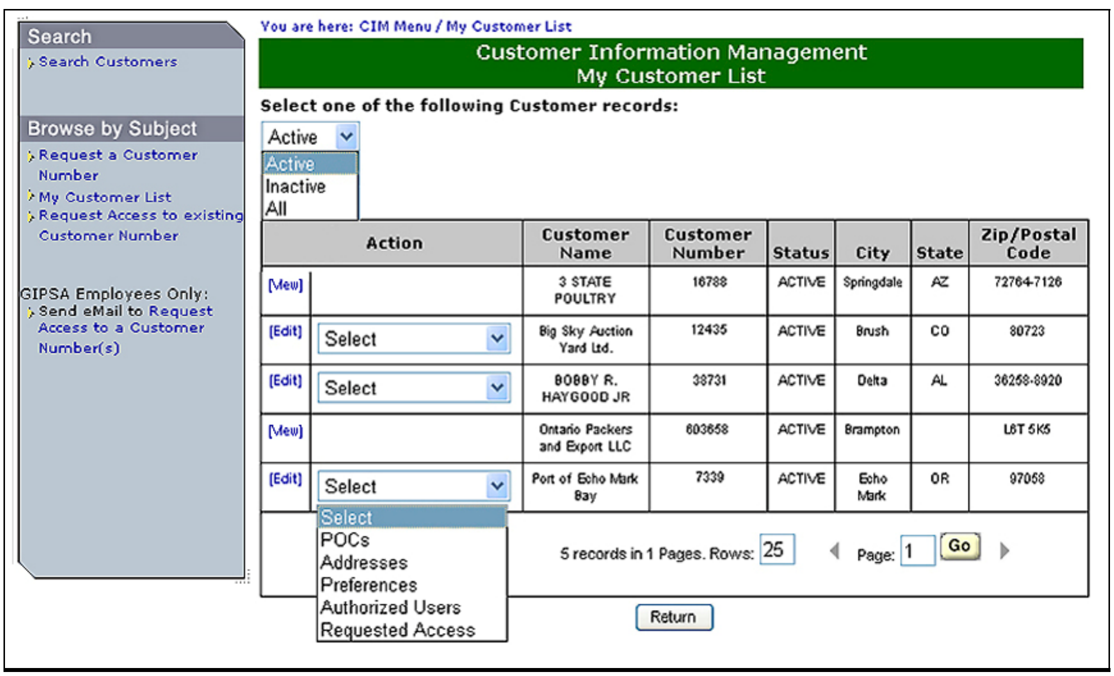


Figure 10 – My Customer List

The **My Customer List** page has an additional special feature. Once a user with edit permissions (POCs) chooses any of the customer record commands — **Edit, POCs, Addresses, Preferences, Authorized Users**, or **Requested Access** — the left-hand Browse navigation panel will change to display a sub-menu (Fig. 11). You can use this sub-menu to quickly navigate through a customer record. When you exit the customer record area and to go a different part of the application, the sub-menu will disappear.

Figure 11 – Close-up of My Customer List command menu

D. 2 — View or Maintain Customer Information

Authorized Users. Select **View** next to a customer record to open the read-only **Maintain Customer** page (Fig. 12). When you are finished with the record, click **Return.**

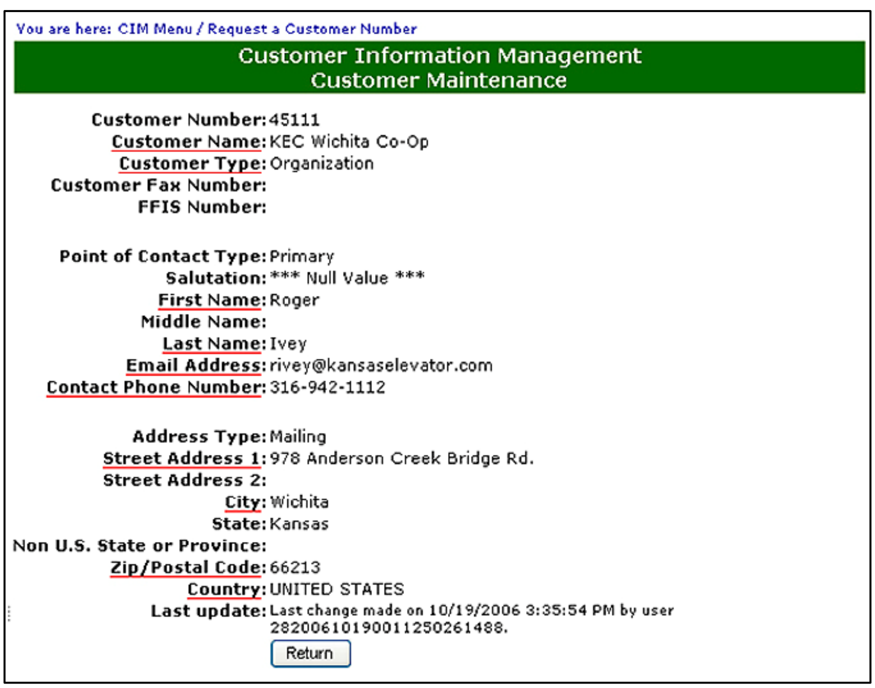


Figure 12 – Customer Maintenance (Authorized Users)

POCs. Select **Edit** next to a customer record to open the **Maintain Customer** page (Fig. 13). When you are finished with the record, click **Save Changes** to save your edits, or **Return** to exit without saving. The fields you are permitted to edit are:

Customer Type,

Fax and Phone Number,

FFIS Number,

Salutation, and

Mailing Address.

For information about changing the *Customer Name*, see section D. 3.

For information about changing the *Point of Contact's Name* or *Email,* or designating a different *primary POC*, see section D. 4.

For information about adding, editing, or deleting customer *addresses*, see section D. 5.

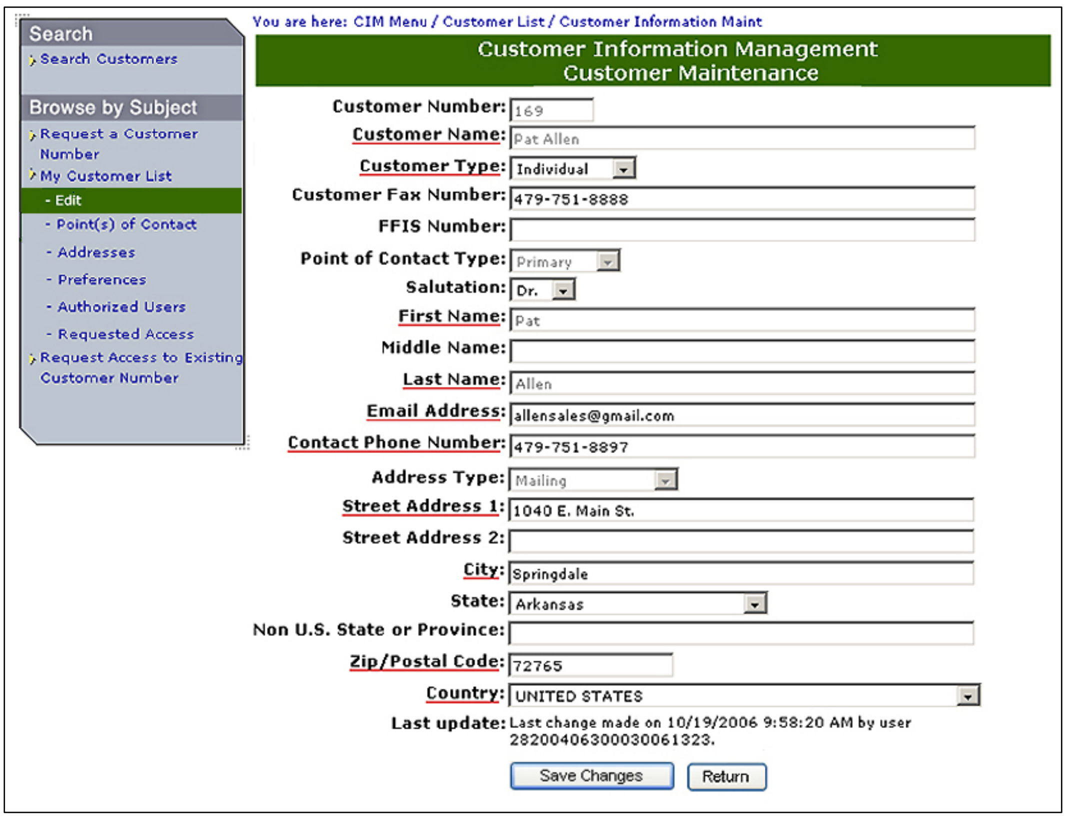


Figure 13 – Customer Maintenance (POCs)

D. 3 — Change Customer Name

It is possible to change the name on an established customer's record; however, POCs are not able to edit the Customer Name field in CIM. To file a request to change the Customer Name field on your account, contact the CIM application administrator.

Note: The customer name is not the same as the point of contact's name. For example, user Bob Smith creates an individual customer record. In this case, both the customer name and the POC name are "Bob Smith." The next year Bob decides to incorporate, and begins doing business as

Smith Farms, LLC. Bob applies to change his customer name to Smith Farms, LLC. He retains the old customer number and his record is changed to "Smith Farms, LLC," with Bob Smith as the POC.

D. 4 — Manage Customer POCs (Points of Contact)

To maintain POC records for a customer, select *Point(s) Of Contact* from the left-hand Browse panel, or select *POCs* from the **Select** command droplist in the Action column. Both commands open the **Customer Point of Contact List** page (Fig. 14).

The POC list displays the customer number, the customer status, the customer name, the customer type, and a table of all primary and secondary POCs. From this page you can perform these actions:

View the contact information for any POC.

Edit any POC's name, salutation, email address, and phone number.

Designate a different primary POC.

Delete secondary POC records.

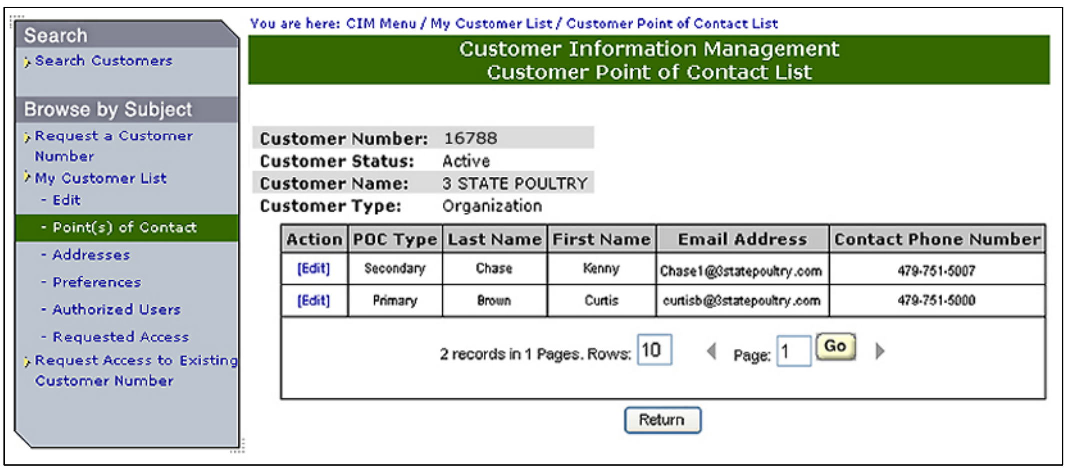


Figure 14 – Customer Point of Contact List

To maintain a POC user's data. Click **Edit** to open the **Customer Point of Contact Maintenance** page for a user (Fig. 15). From this page you can edit the POC's data, either directly within CIM or by requesting changes from a CIM application administrator.

The *Salutation* and *Contact Phone Number* can be changed directly within CIM at any time.

The *Name* and *Email Address* should only be edited when the POC has changed his/her name, or has been assigned a different email address. Consult with a CIM application administrator and request that these fields be changed in eAuthentication before you edit this record in CIM. **Note:** Do not enter the name and email of a different individual into a POC's record.

When you are finished editing the data, click **Save Changes,** or **Return** to exit without saving. If you were editing a primary POC's record, your changes will appear on the **Maintain Customer** page as well.

To delete a secondary POC and demote him/her to an authorized user. Click **Edit** and then **Delete Record** for the secondary POC. The user will still be on the Authorized Users list (see section D. 8).

To change a POC from secondary to primary. Because there must be a valid primary POC for each customer record at all times, you cannot directly delete a primary POC record, or edit the existing primary POC record to substitute a different individual's data. However, you can replace a primary POC by upgrading a secondary POC to take his or her place.

Click **Edit** to open the record of the secondary POC whom you wish to upgrade to primary. Activate the *POC Type* droplist at the top of the record and choose *Primary.* Click **Save Changes.** When you see a warning popup window (Fig. 16), click **Ok** to continue with the action, or **Cancel** to stop the upgrade.

For information on upgrading an authorized user to secondary POC status, see section D. 8.

For information on granting secondary POC status to a new user when approving a request for authorization, see section D. 9.

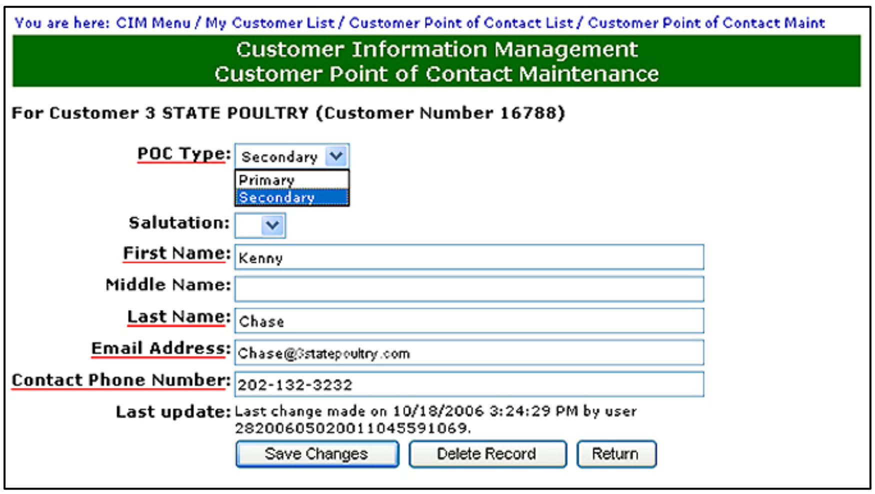


Figure 15 – Customer Point of Contact Maintenance

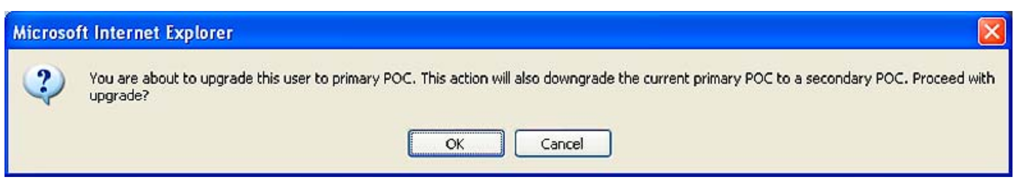


Figure 16 – Customer Point of Contact Maintenance Confirmation Request

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D. 5 — Manage Customer Addresses

CIM allows up to five addresses per customer record. The *mailing address* is mandatory for each customer record, and is established with each new customer number. The details of the mailing address can be edited, but the address *type* cannot be changed.

Customers can have up to four additional addresses, one of each type:

Billing. The address for correspondence related to billing, such as supervision fees and administrative tonnage fees.

Business. The address for any additional facility or operating location, if different from the mailing address.

Certificate Receipt. The address to which certificates of official service results, such as inspection and weighing services, should be sent.

Home. The customer's home address.

To maintain address records for a customer, select *Addresses* from the left-hand Browse panel or with the **Select** command droplist in the Action column. Both commands open the **Customer Address List** page (Fig. 17). This page lists all existing addresses, and allows the user to add, edit, or delete additional addresses.

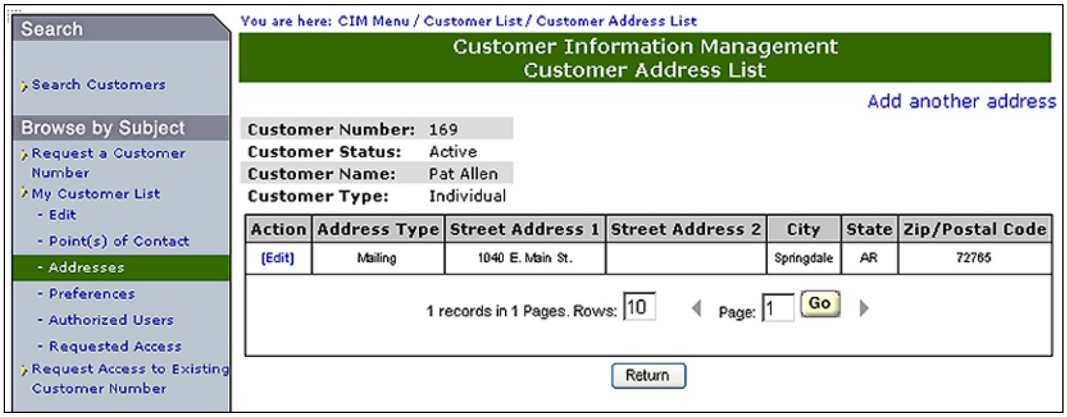

Figure 17 – Customer Address List

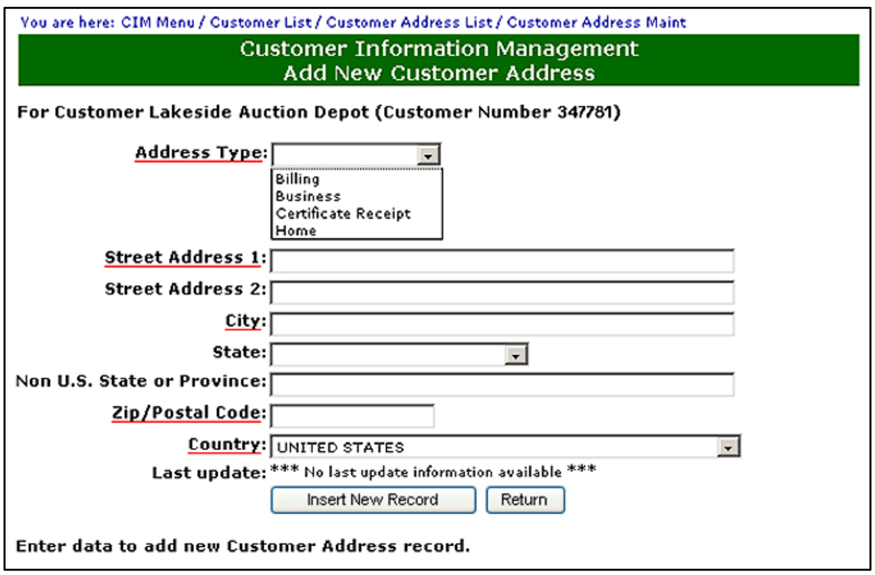

Figure 18 – Add New Customer Address

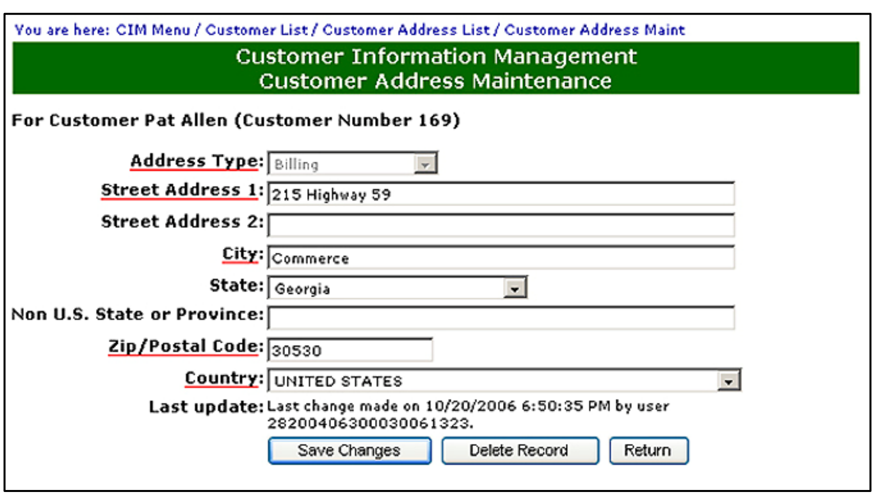

Figure 19 – Customer Address Maintenance

To *create a new type of address* for the customer, click **Add Another Address** in the top right corner to open the **Add New Customer Address** page (Fig. 18). Use the *Address Type* droplist to select the kind of address being added: billing, home, certificate receipt, or business. Since you can only add one of each address type, the droplist will display only the remaining choices.

Enter the address information and click **Insert New Record**, or **Return** to exit without saving.

To *edit an existing address*, click **Edit** to open the **Customer Address Maintenance** page (Fig. 19). Edit the address fields and click **Save Changes**, or **Return** to exit without saving. The *Address Type* field cannot be changed on this page.

To *delete a customer address,* click **Edit** and then select **Delete Record.** Once you delete a given address type, it can be added back at a later time.

D. 6 — Manage Customer Addresses For Multiple Locations

Several types of business, such as cooperatives and large corporations, have multiple facilities or locations to track within CIM. The correct business procedure is to create a customer record for the parent company, and then create separate customer records for each of the operating locations or subsidiaries. After the records are created, the POC for the parent company can request access as a secondary POC to each of the customer records for the subsidiaries, as required.

For example: KEC Elevator Services Inc. is a company based in Topeka, Kansas. In addition to its central offices, KEC owns and operates grain elevators in Abilene and Wichita. Each of these grain elevators has its own separate mailing address and location. Each elevator uses the Topeka main office address for billing and certificate receipt.

Jan, who is vice president for KEC Elevator Services, uses CIM to establish a customer account for KEC's central office. She then asks Alan and Pat, who are operations managers at Abilene and Wichita, to establish a CIM account for each of those elevators (Fig. 20). After customer numbers are assigned to all three locations, Alan and Pat each grant Jan access to their customer numbers as a secondary POC, so that the parent office can access records for every division of the company.

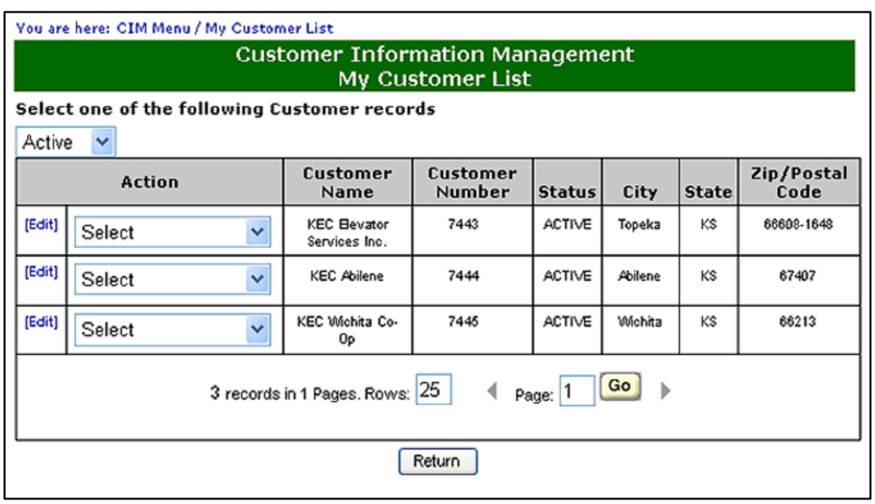

Figure 20 – My Customer List: Multiple Operating Locations

D. 7 — Manage Customer Preferences

CIM allows customers to set preferences for how they want certain business processes to be handled by the USDA, GIPSA offices, official agencies, and/or service providers. One example of a business procedure is the daily release of service result records from IDW (Inspection Data Warehouse) to the customer who receives official services. In this example, the customer could set the *Customer Release Y/N* preference to *No*, to indicate that records should not be sent.

To maintain preferences for a customer number, select *Preferences* from the left-hand Browse panel, or select *Preferences* from the **Select** command droplist in the Action column. Both commands open the **Customer Preference List** page (Fig. 21). This table displays the current preferences (if any), and allows the user to add, maintain, or delete existing preferences.

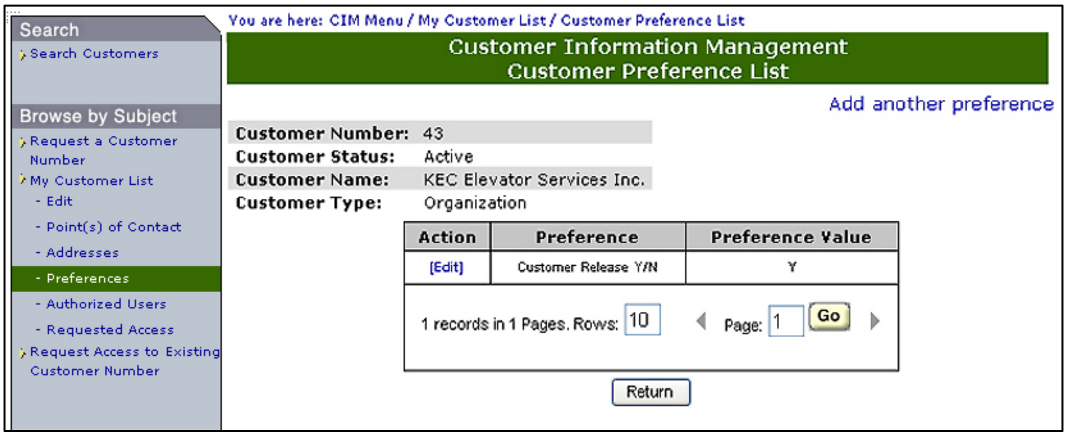

Figure 21 – Customer Preference List

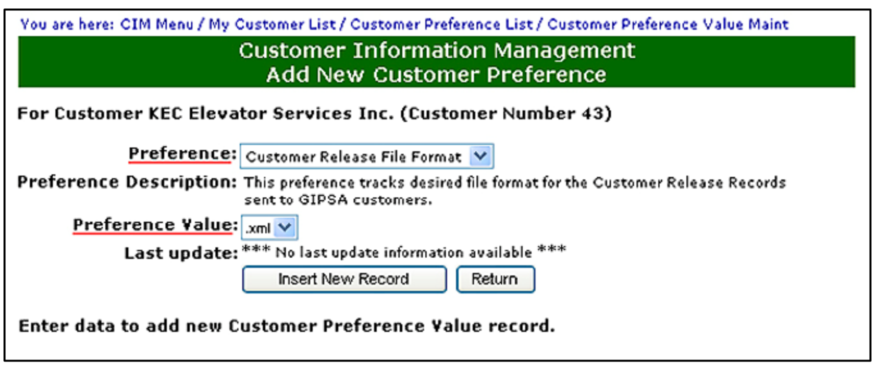

Figure 22 – Add New Customer Preference

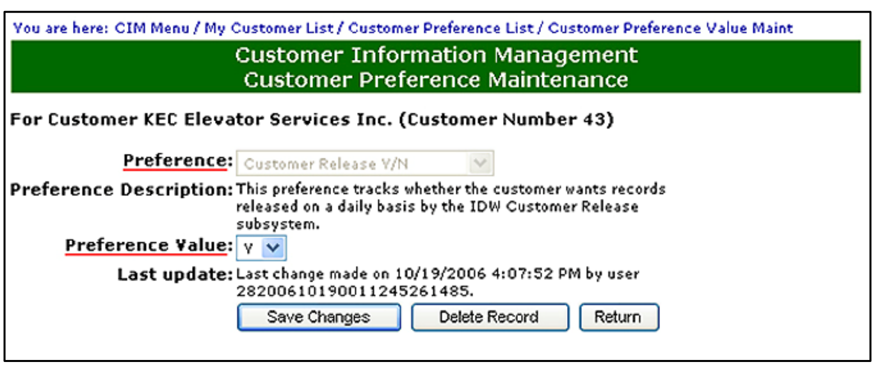

Figure 23 – Customer Preference Maintenance

To *add a new preference,* click **Add Another Preference** to open the **Add New Customer Preference** page (Fig. 22). First, select your preference from the choices in the *Preference* droplist. After you select the preference, the *Description* and *Preference Value* fields will display the options that can be set (for example, *Yes* or *No*). Choose the *value* for your preference, and click **Insert New Record**. Click **Return** to exit without setting a preference.

To *edit or delete a preference,* click **Edit** to open the **Customer Preference Maintenance** page (Fig. 23). Use this form to change the preference *value* (for example, to switch the certificate file format from .xml to .csv). After changing the value, click **Save Changes**, or **Delete Record** to remove the preference entirely from your customer number.

The list of available preferences, and the values allowed for each preference, is maintained by GIPSA employees and application administrators. For more information, see section F.

D. 8 — Manage Customer's Authorized Users

Authorized users are individuals with a Level 2 eAuthentication account or above who have requested, and been granted, access to a customer's data by that customer's POC or POCs. Authorized users are limited to the CIM customer data page (Fig. 12). However, since CIM is a clearinghouse for customer data used by several GIPSA systems, authorization also allows the user to access the customer's information in other applications, such as certificates of service results in IDW (Inspection Data Warehouse) or financial claims within FCM (Financial Claims Management).

To view a list of authorized users for a customer, select *Authorized Users* from the left-hand Browse panel or the **Select** command droplist in the Action column. Both commands open the **Authorized User List** page (Fig. 24). This page displays the customer number, status (Active or Inactive), name, and type (organization or individual), as well as a table of all users associated with the customer number.

Because POCs must also be authorized users, this table displays every user who is associated with the customer number. The *POC Type* column shows whether the user is a *Primary* POC or *Secondary* POC. A blank field indicates an authorized user with read-only (non POC) privileges.

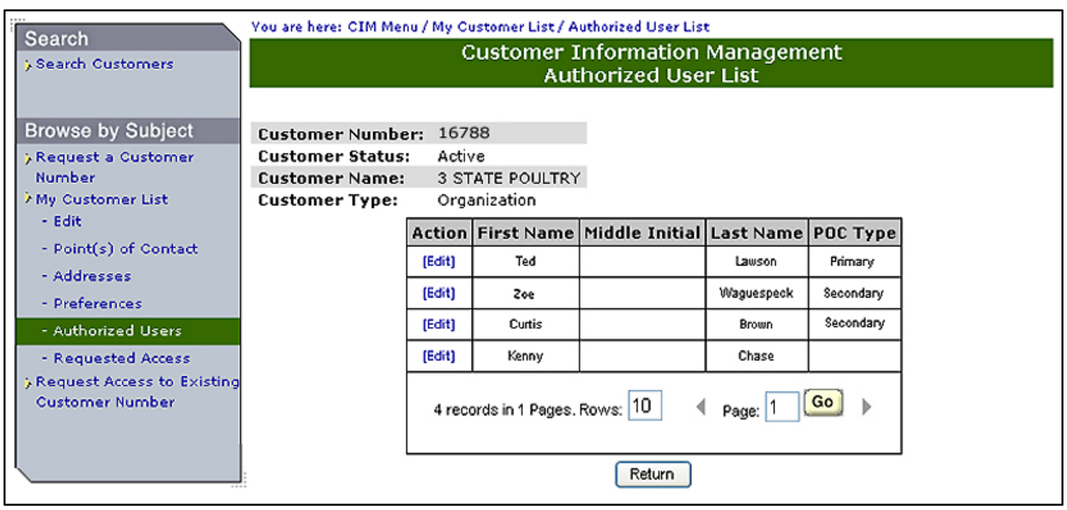

Figure 24 – Authorized User List

To *maintain an authorized user record*, click **Edit** to open the **Authorized User Maintenance** page (Fig. 25). The *POC Type* field will be blank. There are three options on this page:

Click **Upgrade** to change the authorized user to a secondary POC.

Click **Delete Record** to remove the user's authorization to access the customer record. The user will no longer appear on the Authorized User list, and will not be able to access any records associated with that customer number (such as certificates or financial claims).

Click **Return** to exit the record without changing the user's status.

To *maintain a POC user record,* click **Edit** to open the **Authorized User Maintenance** page (Fig. 26). There are two options for a POC user:

Click **Delete Record** to remove the user's authorization to access the customer record. This action also removes the user's POC status.

Click **Return** to exit without removing the user.

Primary POC records cannot be deleted or upgraded. To delete a primary POC from a customer number, first downgrade the user to a secondary POC, then proceed as with deleting a secondary POC.

You cannot use the Authorized User list to create a new authorized user. See the following section for information on creating a new authorized user for a customer number.

Figure 25 – Authorized User Maintenance (POC)

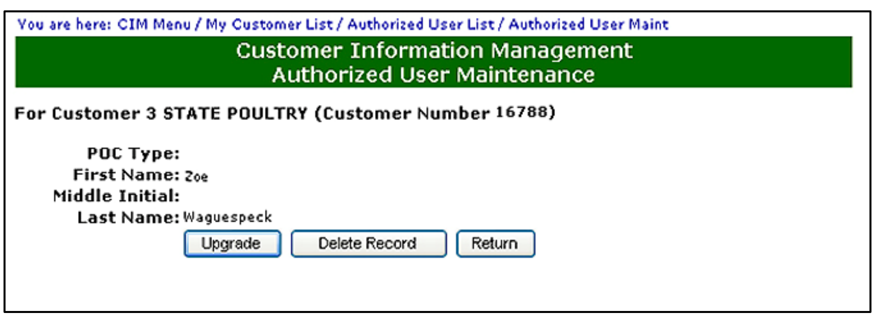

Figure 26 – Authorized User Maintenance (non-POC)

D. 9 — Manage Requests For Access to Customer Numbers

After a user requests access to a customer number (see section C. 1), you (or any POC for your customer number) can approve or deny the request. You can also grant POC status to a new user.

Select *Requested Access* from the left-hand Browse panel or the **Select** command droplist in the Action column. Both commands open the **Customer Requested Access List** page (Fig. 27). This page displays the customer number, status (Active or Inactive), name, and type (organization or individual), as well as a table of all requests for access which have been logged since the customer number was assigned.

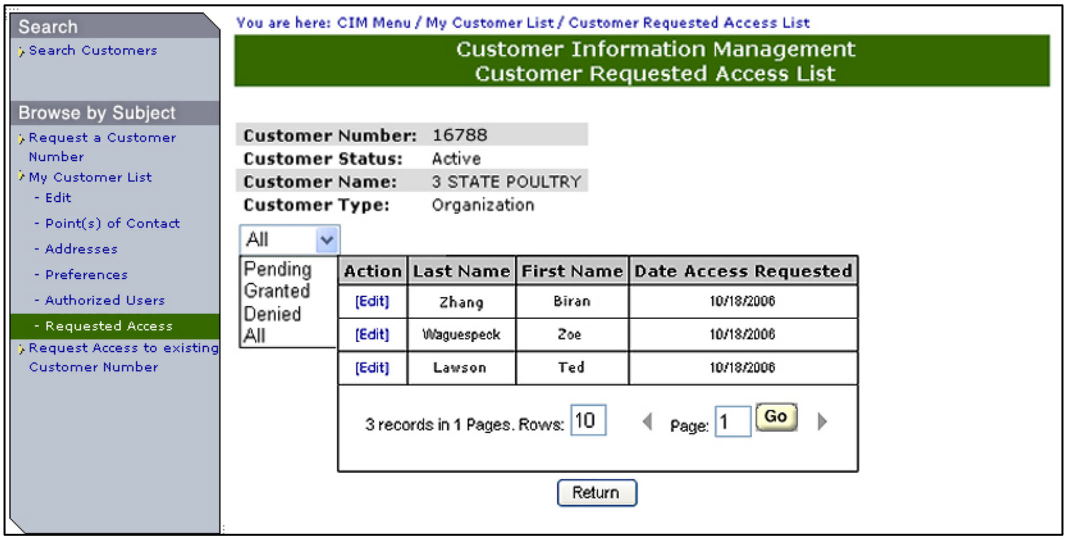

Figure 27 – Customer Requested Access List

Use the droplist at the top of the page to select the type of record to view: *Pending, Denied, Granted*, or *All*. The table will display each request by the user name and request date.

To *grant or deny access to a new user*, select **Pending** records (by default, the screen is set to display only pending records unless otherwise filtered with the droplist). Click **Edit** to open the **Customer Requested Access Maintenance** page (Fig. 28). All fields will be pre-filled except for *Secondary POC?* and Remarks.

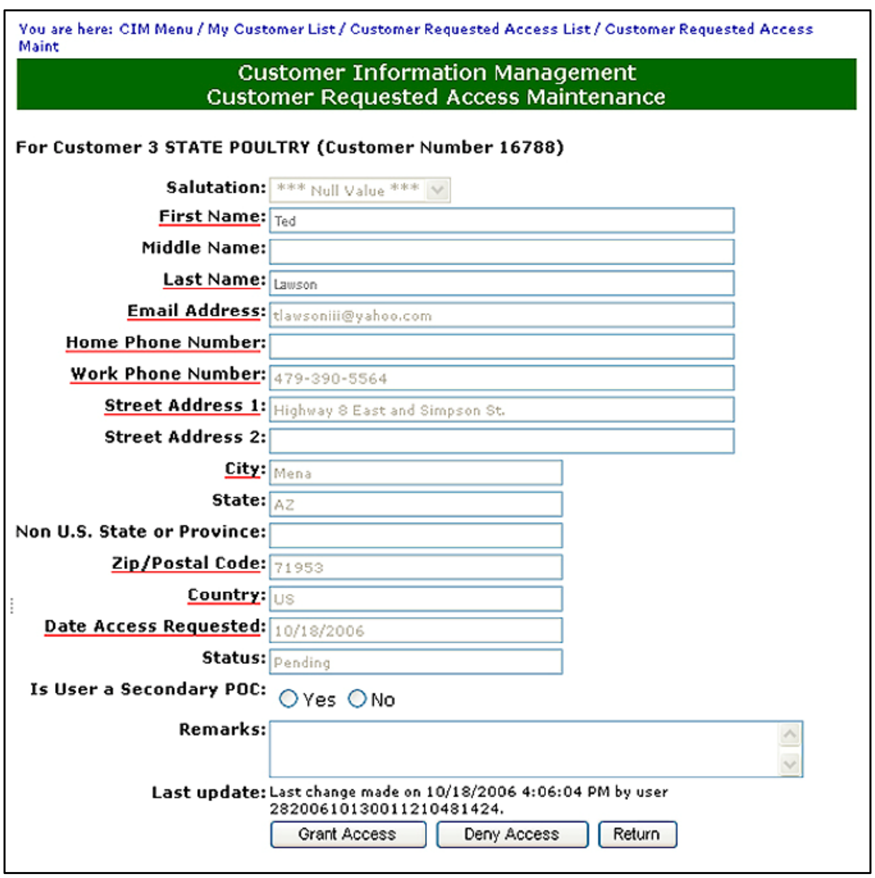

Figure 28 – Customer Requested Access Maintenance (Pending)

To make the user both an authorized user and a secondary POC, click the **Yes** radio button next to “Is User A Secondary POC?”

If the user is not a POC, click **No** or leave the buttons blank.

Click **Grant Access** to make the user an authorized user and/or a secondary POC.

Click **Deny Access** to reject the request. If you decide to authorize the user at some point in the future, the user must re-apply for access as described in section B.

If the request is denied, you are also required to enter a description of your decision to deny the request in the **Remarks** text box (Fig. 29).

Click **Return** to keep the record in “Pending” status. Pending users cannot access any records tied to your customer number.

CIM retains a permanent log of all access requests, no matter the outcome. All records of request for access, once denied or approved, become read-only. To review any previous decision to authorize or deny access, click **Edit** to open the archived request and view the remarks or the date on which access was granted (the **Last Update** field).

Once you grant access permission to a user, it will not expire. You must manually remove access authorization from a user as described in section D. 8.

Figure 29 – Customer Requested Access Maintenance (Denied)

E. Search Customer Records

E. 1 — Customer Search: Overview

Select **Search Customers** from the top of the left-hand Search / Browse panel to open the **Customer Search** page (Fig 30).

CIM only allows you to search for and view customer records that match your user type and access permissions.

GIPSA administrators or users with full CIM edit permissions: These users can search for any customer record in the CIM database, view all records, and edit any record from the search results.

GIPSA users with read-only permission: These users can search for customer records in the CIM database, depending on their business needs. For example, a GIPSA employee who manages financial claims may have access to all customers who operate the State of Alabama, while an official agency employee may have access to all customers who receive official services from that agency.

Customer POCs and **authorized users:** These users can search for and view only the customer numbers to which they have access, either as an authorized user or as a POC. POCs will also be able to edit customer records directly from the search results.

You can search records by any or all of the data fields listed on the search page. Depending on the field, you will either type in your search value or choose from existing field values. If you search without entering any search values on the page at all, you will pull up all accessible customer records for which you have permission to view.

Fields that require operands will display a droplist of commands to the left of a blank field where you can type your search value:

Contains finds records using all or part of that word or phrase, including spaces. It is not case sensitive.

= finds records that exactly match your data.

< finds records containing numeric values less than your search criteria, or alphabetical characters which fall earlier in the alphabet than your search value.

> finds records containing numeric values greater than your search criteria, or alphabetical characters which fall later in the alphabet than your search value.

<= finds records containing values less than or equal to your search criteria.

>= finds records containing values greater than or equal to your search criteria.

Other data fields provide a list of choices, such as "Customer Type." To add a search value from a list, highlight it with a mouse-click and use the **Select >>** button. The highlighted value will move into the white box on the right. You can add values one at a time, or you can hold down the CTRL key while highlighting multiple values and click **Select >>** to add them all at once. To de-select a search value, highlight it and click <<**Remove.**

For all blank data entry fields, any text you enter will be treated as a text string. For example, entering "br" in the "Customer Name" field will include results for Tom Brown and Kirby Yarbrough.

Use the **Show Results As** droplist at the bottom of the page to generate your results in one of two formats:

as a *web page*. From here you can view all records matching your search criteria. If you have edit permissions for a customer, you can edit record data directly from the search results.

as an *Excel spreadsheet*. You can open the spreadsheet within a new browser window, or save it as a file to your local computer. Record data cannot be edited from the spreadsheet.

Note: You should never use the back button on your web browser to navigate through CIM. Always use menu commands, the CIM navigation buttons at the bottom of the page, or the breadcrumbs area at the top of the application area.

E. 2 — Search Customer Data

Once you have selected your search values, click **Search Data** to begin your search. CIM allows you to search on any combination of the customer number, customer name, the status (active or inactive), and the mailing address of record. **Note:** searching for a customer name is not the same as searching for a POC's name.

To look at your results records in turn, start with the first record and select a portion to examine, such as **POCs**. When you are finished, click Certificate Results in the breadcrumbs area to return to your list of search results. If you do not use the breadcrumbs, you will return to the main customer list, and be required to re-run the search.

To exit your current search results and run a new search, use the **Search Customers** command in the left-hand Search / Browse panel.

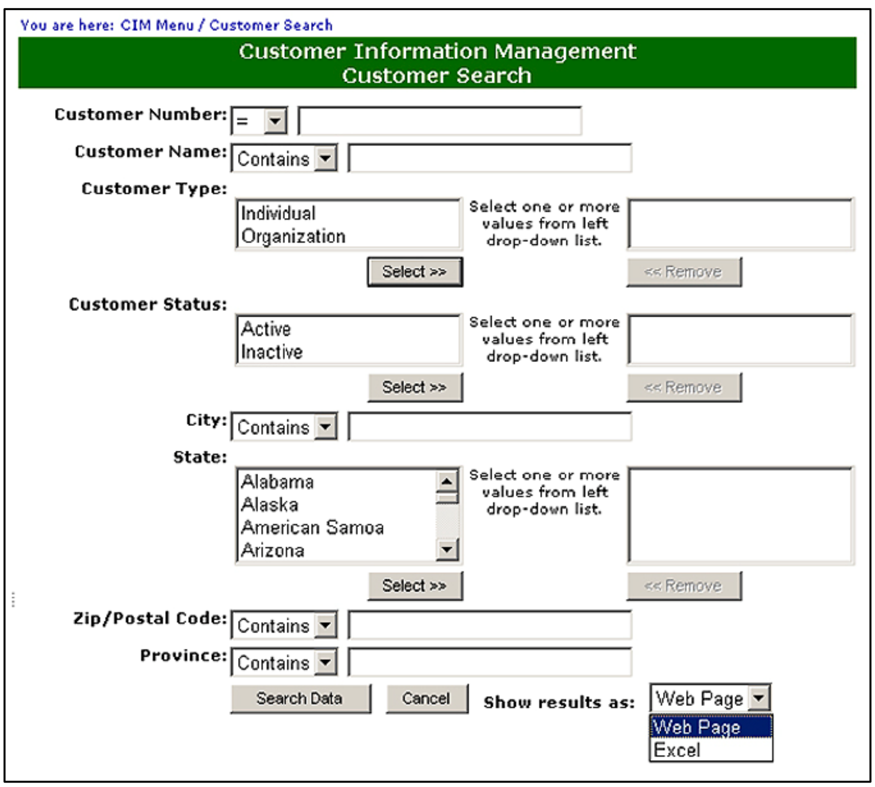

Figure 30 – Customer Search

F. Maintain Preferences

F. 1 — CIM Preference Overview

CIM allows customers to set preferences for how they want certain business processes to be handled by the USDA, GIPSA offices, official agencies, and/or service providers. One example of a business procedure is the daily release of service result records from IDW (Inspection Data Warehouse) to the customer who receives official services.

CIM application administrators can configure the range of preferences available to the customer, and maintain the values (code variables) for each preference.

F. 2 — View and Maintain Preferences

From the CIM Menu Page (Fig. 5) or the left-hand Browse panel, select **Maintain Preferences** to open the **Maintain Preferences** table (Fig. 31). From this page you can view or edit existing preferences, add a new preference, and view or edit existing preference values.

The data fields are:

Number, an internal field that shows the order in which the preference was added to the CIM database.

Name, the preference's name as it appears in the customer's droplist of preference options (as in Fig. 22).

Description, a text description of the preference and its business use.

Status, which shows if the preference is *Active* or *Inactive.*

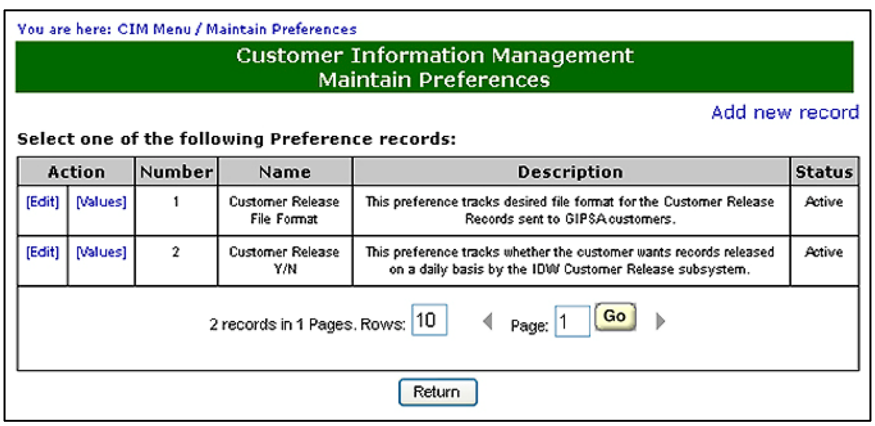

Figure 31 – Maintain Preferences

To view the details of a preference record, click **Edit** to open the **Preference Maintenance** screen (Fig. 32). From this page you can view the last update information (including timestamp and user ID), or edit the preference's name, description, or status.

To edit a preference, make your changes to the *Name*, *Description*, or *Status* fields and click **Save Changes**, or **Return** to exit without saving.

Preferences cannot be deleted from CIM, but they can be made inactive. When you change a preference record's status to *Inactive*, it will continue to affect business processes for customers who are using the preference, but will not be available to assign to new customers.

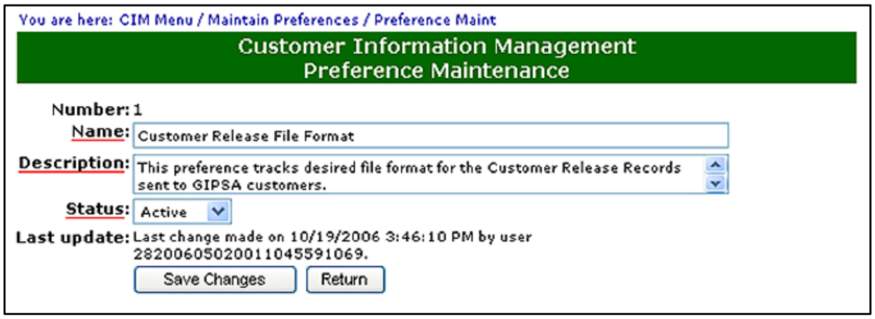

Figure 32 – Preference Maintenance

F. 3 — Add New Preference

To create a new CIM preference, select **Add New Record** to open the **Add New Preference** screen (Fig. 33). Enter the data for the new preference and click **Insert New Record**, or **Return** to exit without saving. CIM will automatically assign a preference number.

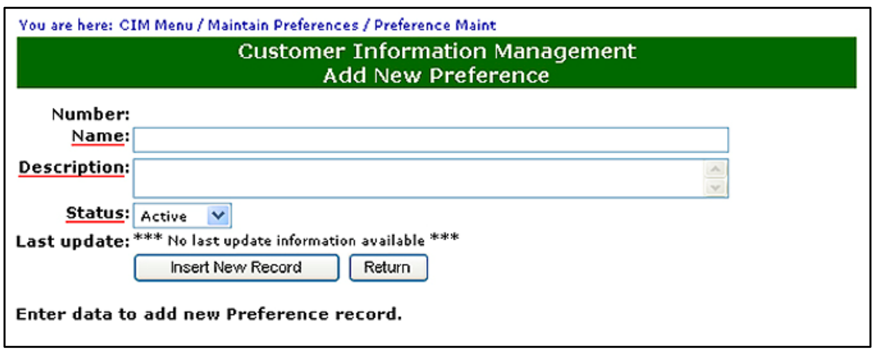

Figure 33 – Add New Preference

F. 4 — View and Maintain Preference Values

To view the code values assigned to a preference, click **Values** in the main preferences table to open the **Preference Value List** for a record (Fig. 34). From this table you can add a new preference value, change a preference value's content, description, activity status, or sequential list order, or remove a value from active use.

The data columns are:

Value, the text of the preference value as it appears within the customer's droplist of value choices.

Description, a text field that further describes the preference value's business purpose.

Display Order, numeric designations that control the sequence in which the values appear in a variable droplist.

Status, which can be *Active* or *Inactive*.

To view the details of a preference value, click **Edit** to open the **Preference Value Maintenance** screen (Fig. 35). From this page you can view the last update information (including timestamp and user ID), or edit the value's name or description in the following ways:

Change the value name. **Note:** this will affect what the customer sees in a droplist of available preference values.

Change the description or display order.

Set the value to *Inactive* or *Active* status. Inactive values will continue to affect business processes for customers who are using the value, but will not be available to assign to new customers.

Click **Save Changes** to save your edits, or **Return** to exit without changing the preference value data.

Preference values cannot be deleted from CIM.

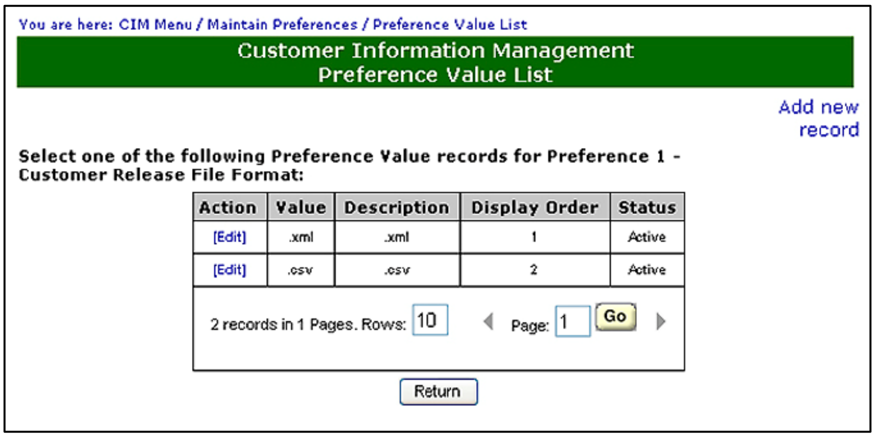

Figure 34 – Add New Preference

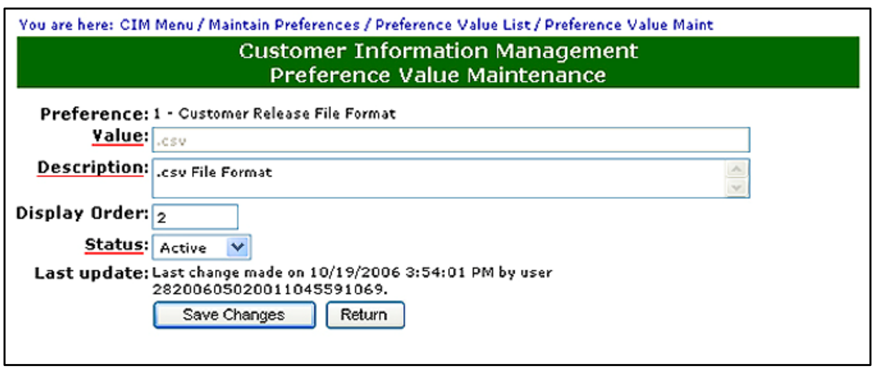

Figure 35 – Preference Value Maintenance

F. 5 — Add New Preference Value

To add a new preference value, select **Add New Record** from the **Preference Value List** screen. This command opens the **Add New Preference Value** screen (Fig. 36).

The *Preference* field will be set to the parent preference's name.

Enter a *Value*, the text that appears in the customer's droplist of value options.

Enter a *Description,* the text that will appear in the preference value records list.

Enter an optional *Display Order* number.

Set the *Status* to Active, if the value will go into immediate use, or Inactive, if the value is a future requirement that has not yet been implemented in CIM.

Enter the data for the new value and click **Insert New Record**, or **Return** to exit without saving.

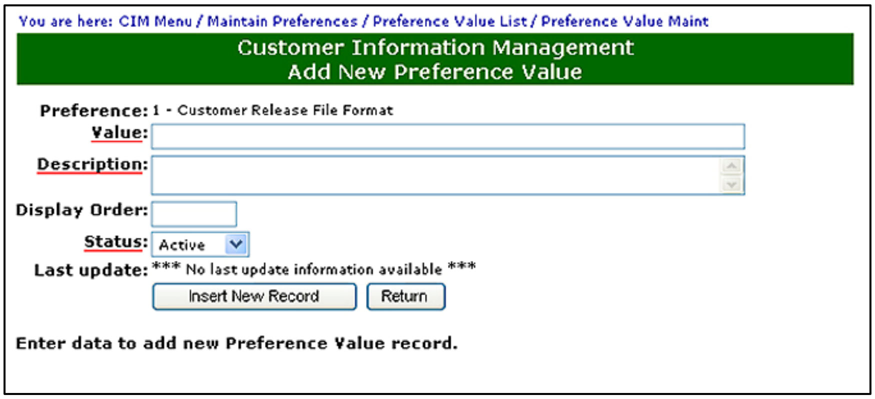

Figure 36 – Add New Preference Value

I. CIM and eAuthorization

I. 1 — Configuring User Access to CIM

GIPSA's eAuthorization System (GAS) maintains access permissions for each CIM user, while the USDA's eAuthentication monitors application security and authenticates users for access to customer records.

Access to CIM is governed through GAS with a combination of *User Roles* and *User Identities.* At this time there are five pre-defined User Roles for CIM. These values will appear in the dropdown menu for *Role* on the **Add New User Role** screen (Fig. 37).

CIM Administrator,

CIM GIPSA – Full Edit,

CIM GIPSA – Display Only,

CIM Public Full Edit,

CIM Public Display Only.

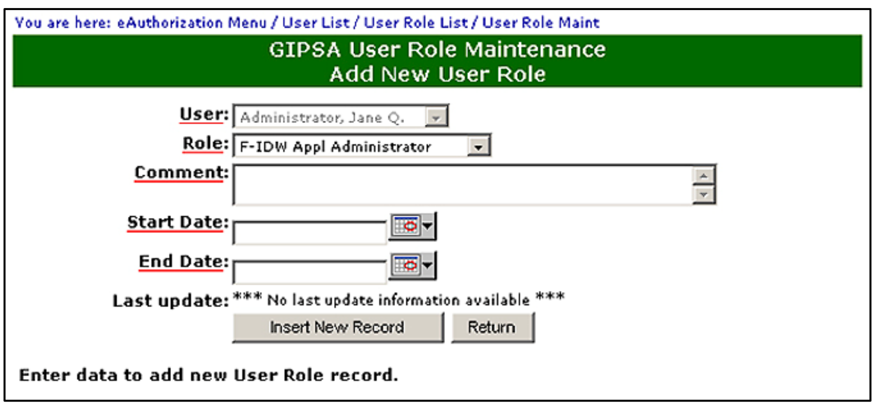

Figure 37 – eAuthorization: Add New User Role

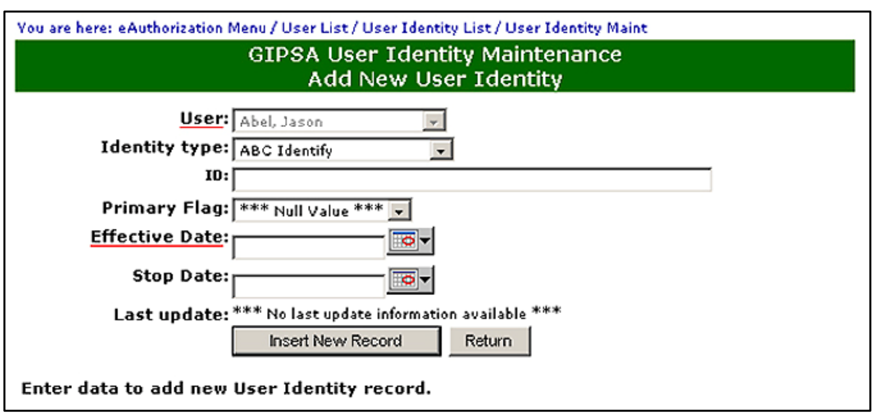

Figure 38 – eAuthorization. Add New User Identity

Most eAuthorization CIM roles will be automatically assigned during the process of granting permissions to a user. For example, when a public user creates a customer, s/he is automatically assigned a *CIM Public Full Edit* role (except for Level 1 users). Authorized public users who are not POCs are automatically assigned *CIM Public Display Only* roles when access is granted.

In cases where eAuthorization roles are not automatically added, they can be manually added with the **Add New User Role** screen.

Access to customer records are further governed with the User Identity. Once access to a customer number has been granted to a user, they are automatically assigned a CIM Customer Number identity with an *Identity* value of "CIM Customer Number" and an *ID* value of *[unique CIM identifier]*. In some cases it may be necessary to manually assign access to a customer identity through eAuthorization (Fig. 38). For more information on this business process, contact your CIM application administrator or GIPSA administrator.